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Now Available: Custom Buyer Roles In B2B Edition



Starting in the week of June 17, 2024, B2B Edition users on the Buyer Portal experience can create custom user roles for their B2B customers. This allows you to support specialized actions and restrict access for your corporate clients.

Why should I offer custom roles to my B2B customers?

By default, B2B buyers in all Company accounts can be assigned the role of **Junior Buyer**, **Senior Buyer**, and **Admin**. While this does allow Company account managers to restrict who can access different areas of the storefront Buyer Portal and make purchases, it does not allow for more specific workflows that they may want their staff to have.

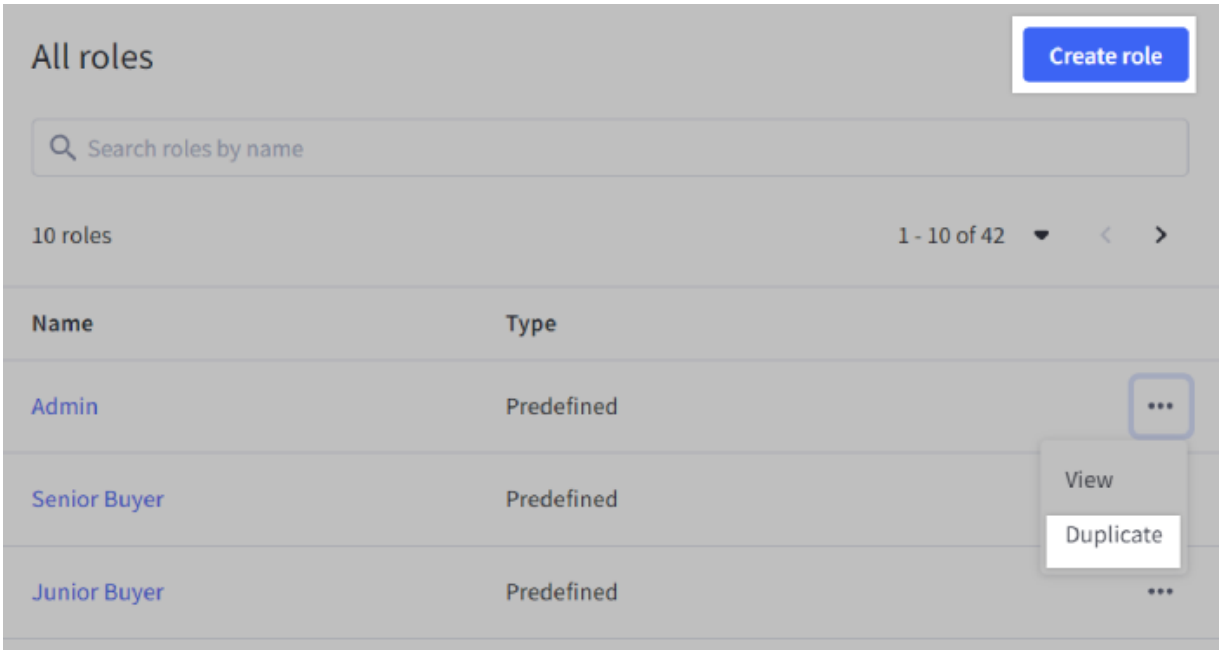
Creating custom roles for your clients creates a more personalized B2B experience and allows them to interact with you in a way that suits their business needs. This is especially helpful if you do business with larger Company accounts that have many staff users responsible for specific aspects of the purchasing flow.

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Getting started with custom buyer roles

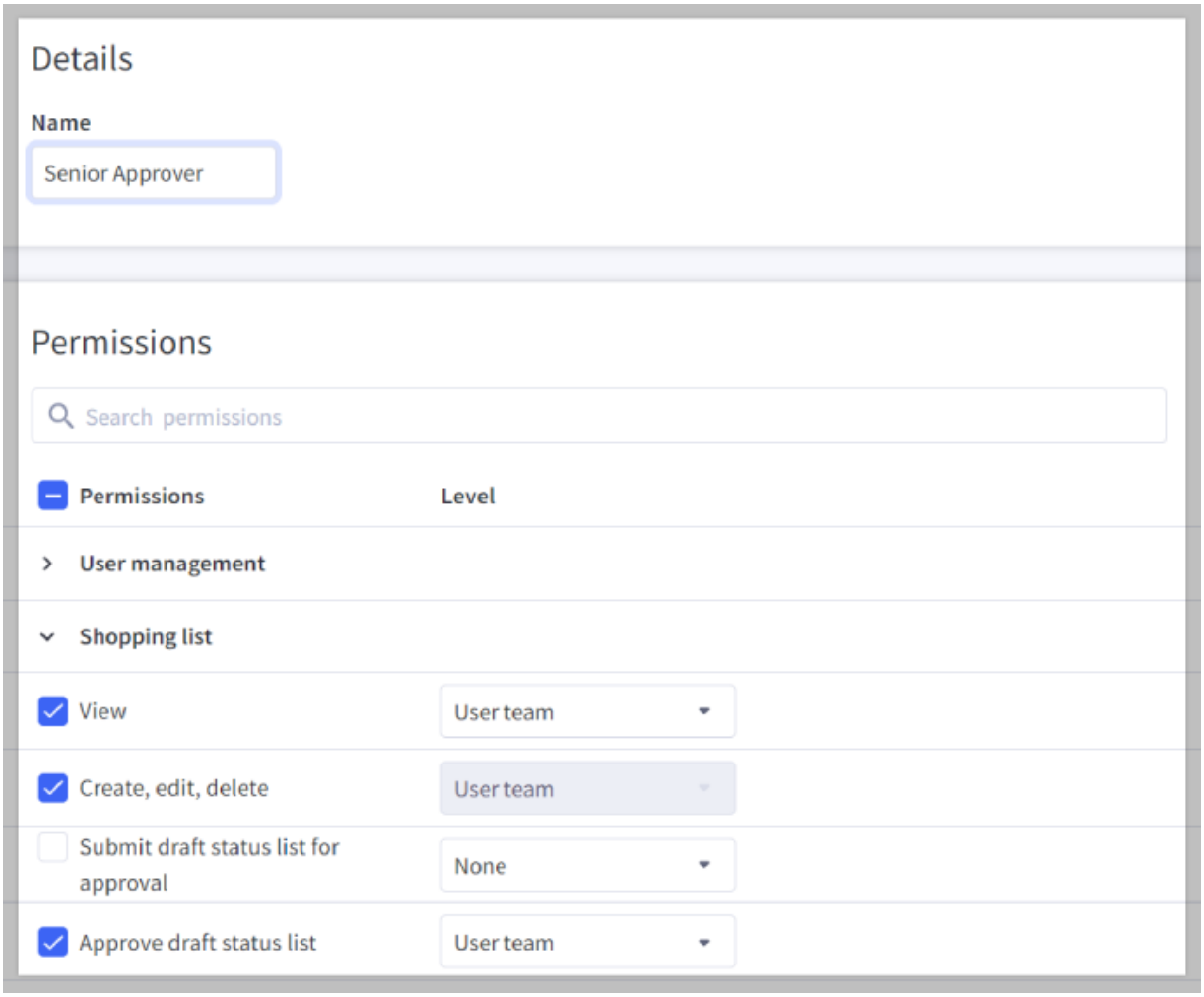
To create a new buyer role, go to the **Settings** › **Company users and roles** area of the B2B Edition dashboard and click on the **Roles** tab. From here, you can create a new role from scratch, or duplicate an existing one to work from a template.



While creating a custom buyer role, give it a descriptive name, and configure the desired permissions. Note that some buyer permissions are prerequisites to enable other Buyer Portal functionality.

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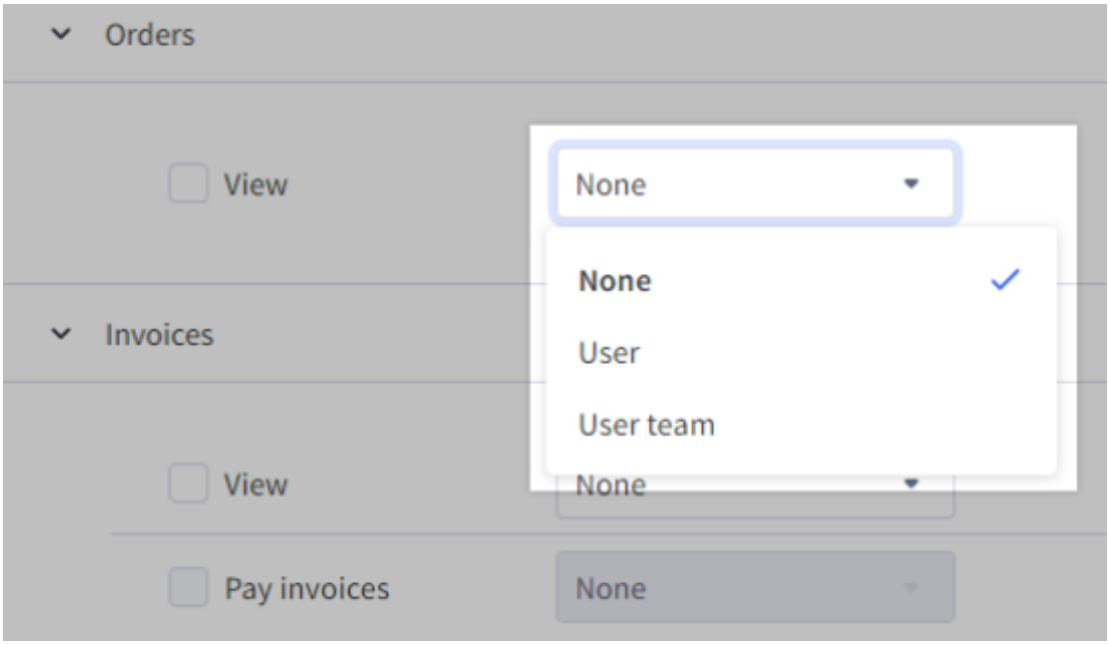
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Additionally, you can specify whether the permission only applies to a buyer's own records, such as Shopping Lists or orders, or extends to all buyer records in their Company account. Select the desired permission scope from the **Level** dropdown.

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After creating the new role, you can assign it to buyers from the **Users** tab of **Settings** › **Company users and roles**, or make bulk assignments via CSV import. Buyers with user management permissions can also assign the role from the Buyer Portal.

Once a custom buyer role is available, you can edit its permissions or delete it at any time. Note that predefined roles **cannot** be changed or removed.

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The final word

To learn more about creating and assigning custom buyer roles in your B2B Edition dashboard, see B2B Edition Buyer Roles and Permissions in the Help Center.

Each B2B client relationship is unique. With custom buyer roles, you can enrich that relationship by giving them the access control and workflows they need.

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